

## JANUARY

- 31** The following documents are uploaded to each client's document center:
- 2023 Annual Account Statement – this document includes the 2023 year-end Fair Market Value (FMV)
  - IRS Form 1099-R if you took a distribution in 2023
  - Notice for Required Minimum Distributions (RMD), if applicable

## MARCH

- 31** Digital Trust electronically files the Form 1099-R with the IRS
- 31** Last day to request corrections to your 2023 Annual Account Statement
- 31** Last day to submit FMV Forms and supporting documents to Digital Trust for 2023 FMV amount updates

## APRIL

- 1** IRS deadline to take your RMD if you turned 73 in 2023
- 15** IRS deadline to make IRA contributions for 2023

## MAY

- 31** Digital Trust electronically files the Form 5498 with the IRS, and the Form is uploaded to each client's document center

## JULY

- 1** Reminder to conduct an annual review of your IRA account(s) and investment(s) including reviewing and updating your beneficiary designation and your contact information

## SEPTEMBER

- 15** Contribution recharacterization requests due to Digital Trust

## OCTOBER

- 15** IRS deadline to remove excess IRA contribution(s) that occurred in 2023 for IRA owners who timely filed their federal income tax return or received an extension of time to file
- 31** Completed RMD requests due to Digital Trust for guaranteed processing of RMDs and/or Charitable Distributions by 12/31\*

## DECEMBER

- 1** Completed FMV Form requests due to Digital Trust for guaranteed processing for 2024 Annual Account Statements
- 31** Completed RMD requests for 2024 must be submitted to Digital Trust before the 12/31/2024 deadline to comply with IRS rules

\*RMD requests received after this deadline are not guaranteed to be processed by 12/31/2024 to meet RMD and/or Charitable Distribution IRS requirements.

# Key Dates to Mark in Your 2024 Calendar for IRA

JAN							FEB							MAR							
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
	1	2	3	4	5	6						1	2	3					1	2	
7	8	9	10	11	12	13	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
14	15	16	17	18	19	20	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
21	22	23	24	25	26	27	25	26	27	28	29										
28	29	30	31																		
APRIL							MAY							JUNE							
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
	1	2	3	4	5	6			1	2	3	4								1	
7	8	9	10	11	12	13	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
14	15	16	17	18	19	20	12	13	14	15	16	17	18	19	20	21	22	23	24	25	
21	22	23	24	25	26	27	19	20	21	22	23	24	25	26	27	28	29	30	31		
28	29	30					26	27	28	29	30	31									
JULY							AUG							SEPT							
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
	1	2	3	4	5	6						1	2	3	1	2	3	4	5	6	7
7	8	9	10	11	12	13	4	5	6	7	8	9	10	11	8	9	10	11	12	13	14
14	15	16	17	18	19	20	11	12	13	14	15	16	17	18	15	16	17	18	19	20	21
21	22	23	24	25	26	27	18	19	20	21	22	23	24	25	22	23	24	25	26	27	28
28	29	30	31				25	26	27	28	29	30	31	29	30						
OCT							NOV							DEC							
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
		1	2	3	4	5							1	2	1	2	3	4	5	6	7
6	7	8	9	10	11	12	3	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	10	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	17	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31					



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